



**STATE OF MONTANA
SECRETARY OF STATE'S OFFICE
JOB PROFILE AND EVALUATION**

SECTION I - Identification

Working Title:

HR Assistant/Payroll & Benefits Technician

Department:

Secretary of State

Class Code Number:

434814

Division/Bureau:

Management Services Division

Class Code Title:

Human Resource Assistant

Section/Unit:

Human Resources

Pay Band:

4

Work Address:

Capitol Building, 1301 E. 6th Avenue
Helena, MT 59620

Position Number:

32166011

Phone:

406-444-5829

☐ FLSA Exempt

☒ FLSA Non-Exempt

Profile Completed By:

Kristin Jacobson

Work Phone:

406-444-5598

Work Unit Mission Statement or Functional Description:

The Secretary of State is one of six executive-branch officers originally designated by the Montana Constitution of 1889. The Secretary of State is responsible for all business registrations; reviews, approves, maintains, and distributes records of business and non-profit organizations; and files and maintains records of secured financial transactions under the uniform commercial code. The Secretary of State records notary public registrations and maintains the official records of the executive branch and the acts of the Legislature. The Secretary of State administers the state's record center and provides statewide records management services. The office serves as the central filing and publication source for the Administrative Rules of Montana and the Montana Administrative Register. The Secretary of State serves as Montana's chief election official and is responsible for the application, operation and interpretation of elections laws except those pertaining to campaign finance. The Secretary of State serves on the Board of Land Commissioners and the Board of Examiners.

The Secretary of State's Office is administered by a chief deputy and is separated into five divisions: Administrative Rules and Notary Services, Business Services, Elections and Government Services, Management Services, and Records and Information Management. The Human Resources unit is included in the Management Services division.

The Human Resources unit provides a variety of management and technical support to agency staff including development, implementation, and interpretation of HR policies and procedures; position profiles and pay administration; recruitment and selection; performance management; payroll and benefits administration; career development and training; work environment assistance; and equal employment opportunity.

Describe the Job's Overall Purpose:

The incumbent provides HR support to the Personnel Officer in a variety of areas, including recruitment and selection; policy and procedure development, implementation, and interpretation; research and analysis of policies, laws, and regulations; compensation management; performance management; and training and development. The incumbent in this position is fully responsible for administration of all agency payroll and benefits functions, and serves as the agency point of contact for technical and professional support in payroll and benefits. The incumbent is responsible for entering position data changes in SABHRS, running SABHRS reports and queries, and developing data and analysis sheets as requested. In addition, the incumbent serves as the agency Risk Management liaison; the agency facilities maintenance contact; the agency telephone coordinator; and the HR unit records coordinator. This position reports directly to the Personnel Officer and does not supervise other agency personnel.

Section II – Major Duties or Responsibilities

% of Time

A. Provide HR Support to Agency Personnel Officer:

55%

1. Assist with recruitment and selection activities:
 - i. Prepare vacancy announcements for posting on the state government recruitment and agency websites, and for distribution to newspapers, craigslist, and other advertising media;
 - ii. Accept applications for employment;
 - iii. Maintain complete and confidential recruitment files;
 - iv. Screen applications for completeness (signature, employment preference documentation, timely submittal, résumé, cover letter, responses to supplemental questions, and other required materials);
 - v. Remove applicant survey information from application materials;
 - vi. Prepare screening packets for hiring team members, including screening criteria form;
 - vii. Prepare for signature and send notification letters to unsuccessful candidates and offer letters to successful candidates;
 - viii. Ensure all screening packet materials are returned by hiring team members; and
 - ix. Ensure recruitment files are organized and complete, including documentation of selection decision.
2. Assist with policy and procedure development, implementation, and interpretation:
 - i. Research, analyze, interpret, and report on existing state and agency policies and procedures;
 - ii. Research, analyze, interpret, and report on state and federal laws and regulations; and
 - iii. Provide input into development of new agency policies and procedures.
3. Conduct new employee orientation with all new hires, including payroll, benefits, and retirement system information; office and State policies and procedures; and forms and information, including employment eligibility verification (I-9). Assemble and maintain an adequate supply of new employee orientation packets.

4. Conduct exit meetings with terminating employees to review final paycheck delivery options; retirement withdrawal/information; benefits continuation and prepayment options; and leave payouts. Assemble and maintain an adequate supply of employee termination packets.
5. Maintain a current list of reduction in force employees, if any. Update and revise the list as necessary. Send all vacancy announcements to reduction in force employees.
6. Monitor and track completion of agency performance appraisals and ratings given; file completed performance reviews in employee personnel files.
7. Distribute updated policies, procedures, and information agency employees; collect, track receipt of, and file signed acknowledgement forms.
8. Maintain agency personnel and position files:
 - i. Establish agency filing and records systems to ensure state guidelines and procedures are followed for the efficient control of the creation, utilization, maintenance, and preservation of all records related to agency human resources functions;
 - ii. Oversee archival and disposition of HR records with the Records Management unit; submit accurate and detailed records transmittals; request disposal of records past their retention period; and
 - iii. File all personnel- and position-related documents on at least a weekly basis and ensure files are secure at all times.
9. Ensure all required information and notices (including Equal Employment Opportunity, Federal and State Minimum Wage, Montana Clean Indoor Air Act, Employee Polygraph Protection Act, FMLA, Job Safety and Health, USERRA, MMSERA, proof of Unemployment Insurance coverage, and proof of Workers' Compensation coverage) are posted in each physical work location and updated as needed and as required by state and federal laws, rules, and regulations.

B. Administer Payroll, Benefits, and Position Control Functions:

40%

1. Administer all agency payroll functions:
 - i. Process bi-weekly payroll through the Statewide Accounting, Budgeting, and Human Resources (SABHRS) system. Regular payroll processes include tracking and review of self-service time entry and manager approval; tracking of payable time approval; payroll verification; and expense reimbursement entry and tracking;
 - ii. Enter all payroll information, changes, and corrections into SABHRS, including compensation changes, retroactive pay, job data changes, tax withholding changes, new hires, etc.;
 - iii. Perform calculations of compensation information, changes, and corrections such as retroactive pay, performance bonuses, market ratios, etc.;
 - iv. Enter and maintain appropriate task profile allocations as directed by Personnel Officer and Financial Manager;
 - v. Request needed SABHRS HR security role changes for agency users through agency Security Officer;
 - vi. Analyze payroll documents and forms to determine compliance with state and federal laws, rules, regulations, policies, and procedures;
 - vii. Research and respond to employee questions and administrative inquiries on payroll issues;

- viii. Prepare and distribute payroll-related reports, such as bi-weekly and year-to-date payroll expenditures; working retiree reports; and FTE/vacant budgeted positions;
 - ix. Serve as agency liaison with State Human Resources Division's Central Payroll bureau; and
 - x. Attend all necessary payroll-related trainings and meetings, such as the SABHRS Users' Forum and fiscal year end training.
2. Administer all agency benefits functions:
- i. Process all employee benefits enrollments and changes, including review of forms submitted for accuracy and completeness;
 - ii. Provide information to agency employees on available benefits options and enrollment/change eligibility requirements;
 - iii. Track and administer leave such as sick, vacation, exempt and non-exempt compensatory time, banked holiday, and FMLA. Includes excess vacation leave calculation, employee notification, tracking, and forfeiture; sick and vacation leave qualifying periods for use and/or payout upon termination; sick leave direct grants and sick leave fund donations and requests; and FMLA leave tracking and reporting;
 - iv. Research and respond to employee questions and administrative inquiries on benefits issues;
 - v. Prepare and distribute benefits-related reports;
 - vi. Serve as agency liaison with State Human Resources Division's Central Benefits bureau, Health Care and Benefits Division, and Montana Public Employees' Retirement Administration; and
 - vii. Attend all necessary benefits-related trainings and meetings, such as Benefits Annual Change presentations.
3. Enter position data changes in SABHRS based on information received from Personnel Officer. Provide reports on position data as requested.

C. Perform Other Duties As Assigned:

5%

1. Serve as agency Risk Management Liaison:
- i. Coordinate filing of workers' compensation claims to ensure claims are filed in a timely manner in accordance with applicable laws and regulations; maintain worker's compensation files; ensure all workers' compensation workplace posting requirements are met in each physical work location;
 - ii. Serve as agency liaison with Montana State Fund on all workers' compensation issues;
 - iii. Administer all agency insurance functions through the Risk Management Tort Defense division. Includes annual reporting of agency risk exposure data; election and submittal of information for premium discount programs; and providing reports and information on historical claims, premium rates, coverages, etc.; and
 - iv. Serve as agency liaison with Risk Management Tort Defense (RMTD) division on all insurance issues; serve on State Records Committee as appointed by director of RMTD.
2. Serve as agency facilities maintenance contact:
- i. Serve as the point of contact for General Services Division on all maintenance and repair requests at each work location; and
 - ii. Coordinate requests for needed maintenance and track to ensure timely response.

3. Serve as agency telephone coordinator:
 - i. Submit telephone service requests (TSRs) for phone additions, changes, moves, and deletions as requested by agency management;
 - ii. Maintain all agency phone lists and records, including the internal SOS phone list; Executive and Management Staff contact info wallet cards; State of Montana Employee Directory Search changes and corrections; the Agency Phone Listing page on the State of Montana website; the printed Montana State Government telephone directory; and Montana Dex and other phone books;
 - iii. Provide new employees with voicemail training link, answer questions, and provide assistance in setting up voicemail accounts; work with agency management and employees to monitor and manage voicemail storage times; and
 - iv. Maintain and complete jack maps for each work location (Capitol, Annex, and Records Management).
 4. Perform a variety of other duties as assigned by the supervisor in support of the agency mission and work unit objectives.
-

2. ***Specific examples of problems solved, decisions made, or procedures followed when performing the most frequent duties of this position include:***

Problems and decisions relate to troubleshooting and resolving errors, auditing timesheets and correcting errors, and defining work groups and other pertinent data for time distribution. Position has authority to make corrective decisions and entries to SABHRS time entry and approval screens. This position explains and resolves all benefits administration and changes related to employee preferences, policies, and procedures. Position determines proper records management retention schedules for varied division programs and by following records management procedures. Position provides detailed research, analysis, and interpretation of state and federal policies, laws, rules, and regulations to supervisor as requested.

3. ***The most complicated aspect of this position is:***

This position performs tasks within a diverse set of programs. A specific set of rules and regulations must be followed for each program area (payroll, benefits, position control, recruitment, risk management, records management, etc.). A complicated part of the job involves troubleshooting and resolving difficult errors and problems in these distinct program areas by analyzing and interpreting the appropriate policies, laws, rules, and regulations.

One of most complicated pieces of the job involves the resolution of payroll errors and problems. The position must gather data and interpret information regarding pay plan rules and apply knowledge to individual circumstances.

4. ***Guidelines, manuals, or written procedures that support this position include:***

Available guidelines, manuals, and written procedures available to the incumbent include the Secretary of State's Office Employee Policy and Procedure Manual; State of Montana human resource guides, procedures, and policies; Montana Code Annotated; Code of Federal Regulations; United States Code; Montana State Fund procedures and guidance documents; State accounting guides, procedures, and policies; Montana Operations Manuals; agency standard operating procedures; and Records Management policy and procedure documents.

5. ***Which of the duties and/or specific tasks listed under #1 above are considered "essential functions" that must be performed by this position (with or without accommodations)?***

The following duties are considered essential functions because they require specialized expertise and skill and are the primary reasons the job exists:

Duty A: HR Support
Duty B: Payroll, Benefits and Position Control Management
Duty C: Other Duties

The following mental and physical demands are associated with these essential functions:

PHYSICAL

- Heavy lifting (less than 50 lbs.)
- Carry medium to heavy items (paper boxes, publications, mail trays, books)
- Remaining seated for extended periods of time, with occasional walking, standing, bending
- Operating a personal computer
- Communicate in writing, in person, and over the phone

MENTAL

- Deal with the public on a regular basis
- Ability to multi-task
- Demands for accuracy in all aspects of work
- Ability to meet inflexible deadlines
- Computing arithmetic operations
- Comparing data
- Compiling information
- Analyzing, synthesizing
- Coordinating
- Negotiating
- Instructing

6. **Does this position supervise others?** ☐ Yes ☒ No

Number directly supervised:

Complexity level of the positions supervised:

Position Number(s) of those supervised:

7. **This position is responsible for:**

- | | | | |
|---|-------------------------------------|--------------------------------------|------------------------------------|
| <input type="checkbox"/> Hiring | <input type="checkbox"/> Firing | <input type="checkbox"/> Supervision | <input type="checkbox"/> Pay Level |
| <input type="checkbox"/> Performance Management | <input type="checkbox"/> Promotions | <input type="checkbox"/> Discipline | |
| <input type="checkbox"/> Other: | | | |

8. **Attach an Organizational Chart.**

SECTION III - Minimum Qualifications - List minimum requirements for the first day of work.

Critical knowledge and skills required for this position:

KNOWLEDGE:

This position requires extensive knowledge of SABHRS HR functions, including time entry and approval concepts, and is considered to be the agency expert in SABHRS HR as well as the State Employee Benefits Plan. The position requires a thorough knowledge of human resource laws, policies, and procedures; payroll and benefits administration; office practices and

procedures; state and federal payroll and benefits regulations and requirements; records management laws, policies, and procedures; risk management and safety laws, policies, and procedures; maintenance of filing systems; and the ability to apply this knowledge to a variety of technical assignments.

SKILLS:

This position requires the ability to:

- Work simultaneously on a variety of projects with constant interruptions;
- Maintain high standards and meet deadlines;
- Maintain confidentiality of all office activities;
- Effectively manage complex administrative detail;
- Understand and explain benefit packages offered by the state, state pay rules, workers' compensation laws and regulations, recruitment and selection processes, and records management policies;
- Identify problems, develop solutions, and provide problem resolution recommendations;
- Exercise professional judgment pertaining to all aspects of risk management and payroll administration and management;
- Follow detailed procedures and ensure accuracy;
- Communicate both verbally and in writing with employees and the public;
- Maintain effective working relationships with co-workers, other agency employees, and the public;
- Interpret policies and procedures on a daily basis;
- Accept assignments from several people;
- Prioritize own work; and
- Meet deadlines.

This position requires skills in:

- The operation of general office equipment, personal computers, and typical business applications (word processing, spreadsheets, databases, Internet applications, etc.);
- English spelling and grammar;
- Editing;
- Proofreading;
- Accurately processing documents;
- Problem solving techniques;
- Written and verbal communication;
- Presentation; and
- Customer service techniques.

The incumbent in this position must be highly detail oriented and self-motivated.

Behaviors required to perform these duties:

- **Verbal Communication:** Keeps appropriate individuals informed. Listens to others respectfully, understands or seeks clarification, and responds appropriately demonstrating tact and diplomacy. Expresses thoughts and ideas clearly.
- **Written Communication:** Writes clearly, logically and effectively using proper style, tone, grammar, spelling and punctuation.

- **Flexible at Work:** Responds positively to changes in direction, priorities, responsibilities, personnel or assignments. Works effectively in a variety of situations and with a variety of individuals or groups.
- **Working with Others:** Relates to others in an open and accepting manner; is approachable. Offers and accepts opinions constructively. Adjusts to how individuals and the work unit will react. Treats others with respect. Constructively resolves disagreements. Is open to others' ideas and gives credit and recognition to others.
- **Responsive to Work Needs:** Willing to perform different jobs, cross train, or assist wherever needed. Is aware of co-worker workload and responds accordingly.
- **Takes Action:** Takes effective and appropriate action to perform job duties without being reminded. Willingly accepts more responsibility or more work.
- **Forward Looking:** Suggests improvements and new ideas, technologies, and approaches. Willingly applies new and evolving ideas, methods, designs and technologies to work.
- **Efficiency and Focus:** Uses time effectively and prioritizes tasks. Is aware of workload and makes appropriate adjustments to meet deadlines and complete tasks. Handles interruptions or distractions and stays on task. Achieves goals.
- **Accuracy:** Ensures accuracy of work and makes corrections in a timely manner. Is conscientious and monitors own quality of work.
- **Attendance:** Arrives on time for work and demonstrates good attendance record.
- **Organizational Awareness:** Understands and follows the rules, policies and laws that govern work. Identifies key decision-makers; understands and respects the balance of authority. Acts in an ethical manner.

Education:

Check the one box indicating minimum education requirements for this position for a new employee the first day of work:

- | | |
|---|--|
| <input type="checkbox"/> No education required | <input checked="" type="checkbox"/> Related AAS/2-years college or vocational training |
| <input type="checkbox"/> High school diploma or equivalent | <input type="checkbox"/> Related Bachelor's Degree |
| <input type="checkbox"/> 1-year related college/voc. training | <input type="checkbox"/> Related Master's degree |

Please specify the acceptable and related fields of study:

Required/Acceptable:

Accounting, Business, Public Administration, Business Technology, Office Technology

Related:

Other education, training, certification, or licensing required (specify): None Specified

Experience:

Check the one box indicating minimum work-related experience requirements for this position for a new employee the first day of work:

☐ No prior experience required
☒ 1 to 2 years

☐ 3 to 4 years
☐ 5 or more years

Other specific experience (optional):

Alternative Qualifications:

This agency will accept alternative methods of obtaining necessary qualifications.

☒ Yes ☐ No

Alternative qualifications include:

Coursework related to business or office technology; related work experience.

SECTION IV – Other Important Job Information

Work is performed in a normal office environment, and the position requires the ability to communicate effectively in person, in writing, and over the phone. Work hours vary in complying with numerous deadlines, customer requests, interruptions and wide fluctuations in work volumes, and deadlines require the employee to be able to work under pressure for long periods of time.

SECTION V – Signatures

My signature below (typed or hand written) indicates the statements in Section I to IV are accurate and complete.

Employee:

Name: _____ Title: _____

Signature: _____ Date: _____

Immediate Supervisor:

Name: Kristin Jacobson Title: Personnel Officer

Signature: _____ Date: _____

Deputy:

Name: _____ Title: _____

Signature: _____ Date: _____

Department Designee:

Name: _____ Title: _____

Signature: _____ Date: _____
